

Tips for Using the Interactive Excel Financial Forms

Microsoft Excel is required in order to use the interactive Excel Format. The primary advantage of the Excel format is that the user is able to download the form and save it to disc. Thus the form may be filled out, saved and edited at various times. If you do not possess this application, you may use the printable or interactive Adobe Acrobat formats. PDF, however, does not allow for the saving of the document.

Please note the following tips for the most effective use of the interactive Excel format:

The "**Tab**" key is the most effective way to navigate the form.

Radio Buttons - You will be asked to select the quarter for the report. These are radio buttons. Your answer may be selected by clicking on the appropriate box or by tabbing to the appropriate box and pressing "Enter". The form will permit you to choose only one of these selections. If you make a selection in error, you may deselect a choice by simply selecting another option. Users with windows 2000 or XP may need to adjust the Macros security settings in order to use these buttons. These settings may be accessed by going to the Tools menu to "Macro" to "Security". Users with Excel 97 may not be able to use the radio buttons on-line. If you can not use them on-line, save the document to your computer. After re-opening the document, the buttons should work. If you are still unable to use the buttons, then you may need to fill them out manually once you have printed the document.

"State:" - Enter the two-digit state abbreviation - i.e. "VA".

"Zip:" - Enter either the five-digit or nine-digit zip code. Form will accept up to ten digit entries.

Any telephone no. - Enter the numbers of the ten-digit phone number only. Form will not accept data with parentheses or dashes. Form will automatically format numbers, placing the area code in the parentheses. If this does not occur once you have tabbed away, check to make sure that you do not have an older version of the reader.

Example of the correct format: 1234567890

Examples of incorrect format: (123) 456-7890, 123-456-7890

All pages must be filled out and the completed document must be notarized prior to submission.